Chapter 1

Understanding InDesign Ingredients

In This Chapter

- Getting acquainted with the InDesign approach
- Figuring out global versus local control
- Exploring the document window
- Surveying the top tools
- Becoming familiar with tools and panels
- Discovering what's in the menus

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Starting to use a new software application is not unlike meeting a new friend for the first time. You take a long look at the person, maybe ask a few questions, and begin the process of becoming acquainted. (If you're not new to InDesign but are new to the CS5 version, it's like seeing a friend you haven't seen in a while — you observe any changes and catch up on what's happened in the meantime.)

Just as it's worthwhile to find out the likes and dislikes of a new friend, it's also worth your time to wrap your head around InDesign's unique style and approaches. When you do so, you'll find it much easier to start using InDesign to get work done.

This chapter explains where to look in InDesign for the features and capabilities you need to master. (For a quick look at what's new to version CS5, check out Chapter 26.) I introduce you to the process that InDesign assumes you use when laying out documents, describe the unique interface elements

in the document window, survey the most commonly used tools, and explain how InDesign packages much of its functionality through an interface element called a *panel*.

Understanding Global and Local Control

The power of desktop publishing in general, and InDesign in particular, is that it lets you automate time-consuming layout and typesetting tasks while at the same time letting you customize each step of the process according to your needs.

What does that mean in practice? That you can use *global* controls to establish general settings for layout elements, and then use *local* controls to modify those elements to meet specific requirements. The key to using global and local tools effectively is to know when each is appropriate.

Global tools include

- General preferences and application preferences (see Chapter 2)
- Master pages and libraries (see Chapter 5)
- Character and paragraph styles (see Chapter 13)
- Table and cell styles (see Chapter 18)
- Object styles (see Chapter 9)
- Sections and page numbers (see Chapter 4)
- Color definitions (see Chapter 6)
- Hyphenation and justification (see Chapter 14)

Styles and master pages are the two main global settings that you can expect to override locally throughout a document. You shouldn't be surprised to make such changes often because although the layout and typographic functions that styles and master pages automate are the fundamental components of any document's look, they don't always work for all the specific content within a publication. (If they did, who'd need human designers?!)

Local tools include

- Frame tools (see Part III, as well as Chapter 16)
- Character and paragraph tools (see Chapters 14 and 15)
- Graphics tools (see Part V)

Keep your bearings straight

A powerful but confusing capability in InDesign is something called a *control point.* InDesign lets you work with objects from nine different reference points — any of the four corners, the middle of any of the four sides, or the center — such as when positioning the object precisely or rotating the object. You choose the active reference point, or control point, in the Control panel or Transform panel, using the grid of nine points arranged in a square.

By default, InDesign uses the central reference point as the control point, which is great for rotating an object, but can lead to confusion when you enter in the X and Y coordinates to place it precisely. That's because most people use the upper-left corner of an object when specifying its coordinates, not the center of the object. Be sure to change the control point to the upper-left reference point whenever entering X and Y coordinates in the Control or Transform panels.

How do you change the control point? That's easy: Just click the desired reference point in that preview grid. The control point will be black, whereas the other reference points will be white.

Choosing the right tools for the job

Depending on what you're trying to do with InDesign at any given moment, you may or may not immediately know which tool to use. If, for example, you maintain fairly precise layout standards throughout a document, using master pages is the way to keep your work in order. Using styles is the best solution if you want to apply standard character and paragraph formatting throughout a document. When you work with one-of-a-kind documents, on the other hand, designing master pages and styles doesn't make much sense — it's easier just to format elements as you create them.

For example, you can create *drop caps* (large initial letters set into a paragraph of type, such as the drop cap that starts each chapter in this book) as a character option in the Character panel, or you can create a *paragraph style* (formatting that you can apply to whole paragraphs, ensuring that the same formatting is applied each time) that contains the drop-cap settings and then apply that style to the paragraph containing the drop cap. Which method you choose depends on the complexity of your document and how often you need to perform the action. The more often you find yourself taking a set of steps, the more often you should use a global tool (like character and paragraph styles) to accomplish the task.

Fortunately, you don't need to choose between global and local tools while you're in the middle of designing a document. You can always create styles from existing local formatting later. You can also add elements to a master page if you start to notice that you need them to appear on every page.

Specifying measurement values

Another situation in which you can choose between local or global controls is specifying measurement values. Regardless of the *default measurement unit* you set (that is, the measurement unit that appears in all dialog boxes and panels), you can use any unit when entering measurements in an InDesign dialog box. For example, if the default measurement is picas, but you're new to publishing and are more comfortable working in inches, go ahead and enter measurements in inches.

InDesign accepts any of the following codes for measurement units. (Chapter 2 explains how to change the default measurements.) Note that the *x* in the following items indicates where you specify the value, such as **2i** for 2 inches. It doesn't matter whether you put a space between the value and the code: Typing **2inch** and typing **2 inch** are the same as far as InDesign is concerned:

- *x*i or *x* inch or *x*" (for inches)
- *x*p (for picas)
- *x*pt or 0p*x* (for points)
- *x*px (for pixels)
- *x*c (for ciceros, a European newspaper measurement)
- *x*ag (for agates, an American newspaper measurement)
- *x*cm (for centimeters)
- *x*mm (for millimeters)

What to do when you make a mistake

InDesign is a very forgiving program. If you make a mistake, change your mind, or work yourself into a complete mess, you don't have to remain in your predicament or save your work. InDesign offers several escape routes. You can

- **Undo your last action by choosing Edit➪Undo (⌘+Z or Ctrl+Z).** (You can't undo some actions, particularly actions such as scrolling that don't affect any items or the underlying document structure.) You can undo multiple actions in the reverse order in which they were done by repeatedly choosing Edit➪Undo (⌘+Z or Ctrl+Z); each time you undo, the preceding action is undone.
- **Redo an action you've undone by choosing Edit➪Redo (Shift+⌘+Z or Ctrl+Shift+Z).** Alternatively, choosing Undo and Redo is a handy way of seeing a before/after view of a particular change. As with an undo action, you can redo multiple undone actions in the reverse of the order in which they were undone.

InDesign CS5 adds the capability to specify measurements in pixels, as part of its newfound capability to create "Web-intent" documents in addition to the traditional "print-intent" ones, as Chapter 3 explains.

You can enter fractional picas in two ways: in decimal format (as in **8.5p**) and in picas and points (as in **8p6**). Either of these settings results in a measurement of 8½ picas. (A pica contains 12 points.)

Discovering the Document Window

In InDesign, you spend lots of time working in document windows — the "containers" for your documents. Each document, regardless of its size, is contained within its own document window.

The best way to get familiar with the InDesign document window is by opening a blank document. Simply choosing File➪New➪Document (⌘+N or Ctrl+N) and clicking OK opens a new document window. Don't worry about the settings for now — just explore.

Figure 1-1 shows all the standard elements of a new document window. I won't bore you by covering interface elements that are standard to all programs. Instead, the rest of this section focuses on InDesign-specific elements.

Rulers

Document windows display a horizontal ruler across the top and a vertical ruler down the left side. As shown in Figure 1-1, the horizontal ruler measures from the top-left corner of the page across the entire spread, and the vertical ruler measures from the top to the bottom of the current page. These rulers are handy for judging the size and placement of objects on a page. Even experienced designers often use the rulers while they experiment with a design.

Both rulers display increments in picas unless you change the measurement system for each ruler in the Units & Increments pane of the Preferences dialog box. Choose InDesign➪Preferences➪Units & Increments (⌘+K) or Edit➪Preferences➪Units & Increments (Ctrl+K) to open the Preferences dialog box. Your choices include inches, picas, points, pixels, decimal inches, ciceros, agates, millimeters, and centimeters.

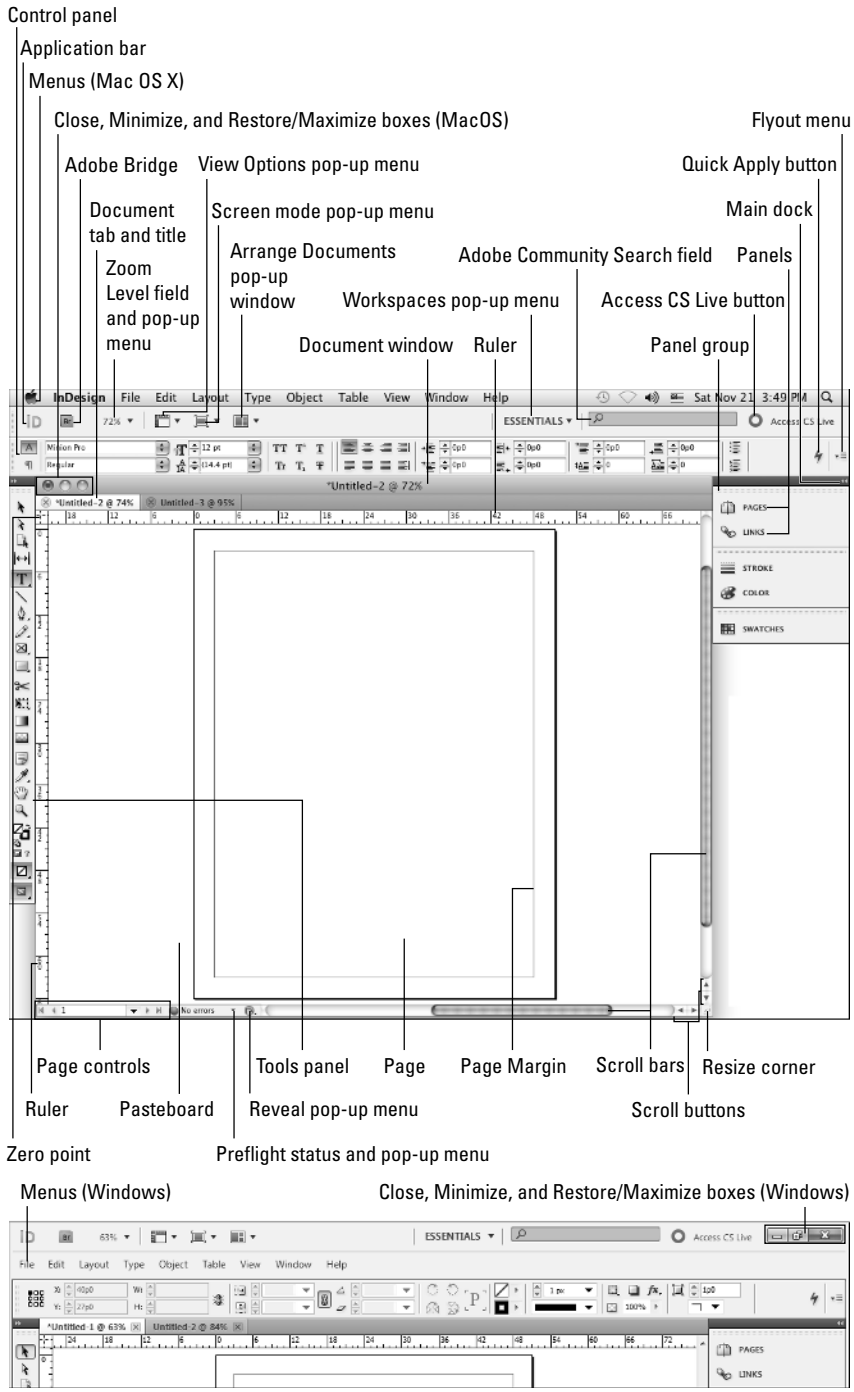

Figure 1-1: The document window is where you work on documents. Bottom: The Windows 7 version differs in its Close, Minimize, and Restore/Maximize controls.

If you change the ruler measurement system when no documents are open, the rulers in all new documents will use the measurement system you selected. If a document is open when you make the change, the rulers are changed only in that document.

You can also create your own measurement system by choosing Custom. Most people should ignore this option, but sometimes it can make sense, such as setting the ruler to match the line spacing, so that you can measure number of lines in your ruler.

If your computer has a small monitor and the rulers start to get in your way, you can hide them by choosing View➪Hide Rulers (⌘+R or Ctrl+R). Get them back by choosing View➪Show Rulers (⌘+R or Ctrl+R).

Zero point

The point where the rulers intersect in the upper-left corner of the page is called the *zero point.* (Some people call it the *ruler origin.*) The zero point is the starting place for all horizontal and vertical measurements.

If you need to place items in relation to another spot on the page (for example, from the center of a spread rather than from the left-hand page), you can move the zero point by clicking and dragging it to a new location. Notice that the X: and Y: values in the Control panel update as you drag the zero point so that you can place it precisely.

If you change the zero point, it changes for all pages or spreads in the document. You can reset the zero point to the upper-left corner of the left-most page by double-clicking the intersection of the rulers in the upper-left corner.

If you move the zero point, all the objects on the page display new X: and Y: values even though they haven't actually moved. Objects above or to the left of the zero point will show negative X: and Y: values, and the X: and Y: values of other objects will not relate to their actual position on the page or spread.

You can lock the zero point, making it more difficult to accidentally change it. Control+click (Mac) or right-click (Windows) the ruler origin and choose Lock Zero Point from the menu that appears. (The Unlock Zero Point command is right there as well, so you can just as easily unlock it.) Locking the zero point is a good idea because it will remind anyone working on your document that you prefer that they not fiddle with the zero point.

Pasteboard

The white area that surrounds the page is called the *pasteboard.* It's a workspace for temporarily storing objects. The pasteboard above and below each page or spread is an inch deep. The pasteboard at both left and right of a page or spread is just as wide as the page. For example, a spread composed of two 8-inch-wide pages has 8 inches of pasteboard to the left and 8 inches of pasteboard to the right, plus 1 inch of pasteboard above and 1 inch below.

You can set your own preferred height and width of the pasteboard. To do so, open the Guides & Pasteboard pane of the Preferences dialog box and choose a new value for the Horizontal Margins and/or Vertical Margins field. (Choose InDesign➪Preferences➪Guides & Pasteboard [⌘+K] or Edit➪Preferences➪Guides & Pasteboard [Ctrl+K] to open the Preferences dialog box.)

Application frame and bar

With the application frame, Mac users can put all the InDesign elements in their own container so that they *don't* float freely and other applications don't peek through. You show the application frame by choosing Window➪Application Frame — doing so makes InDesign for Mac behave like InDesign for Windows. (By default, the application frame is turned *off* in InDesign for Mac.)

Conversely, Windows users can choose Window➪Application Frame to *hide* the application frame so that InDesign for Windows looks like InDesign for Mac. (By default, the application frame is turned *on* in InDesign for Windows.)

The Application Frame menu command is a *toggle,* hiding the application frame if it's visible and showing it if it's hidden. You see a check mark next to the menu option if the application frame is visible. (InDesign uses the same toggling indicator in other menus.)

Above the Control panel is the application bar, which offers easy access to other Adobe applications, such as Bridge, and access to controls over various view options. It appears by default if the application frame is enabled. When the application frame is hidden, you can show or hide the application bar by choosing Window➪Application Bar.

The application bar has several handy elements. From left to right:

- The first element is the set of quick-access buttons to Bridge and other Adobe software.
- The second element is the Zoom Level field and pop-up menu.

- The third element is the View Options pop-up menu, which lets you hide and show frames boundaries, hidden characters, grids, and other such visual aids from one handy location. These options previously existed but only in a variety of scattered menu options (where they also remain).
- The fourth element, the Screen Mode pop-up menu, duplicates the Screen Mode feature at the bottom of the Tools panel (explained later in this chapter).
- The fifth element, the Arrange Documents pop-up menu, gives you fast access to InDesign's controls over how document windows are arranged (covered later in this chapter).
- The sixth element, the Workspaces pop-up menu, gives you quick access to the workspaces you've defined (as described in the "Working with Panels, Docks, and Workspaces" section, later in this chapter).
- The seventh element is the Adobe Community Search menu, which you can use to find help from the Adobe community forums on the Web.

- At the far right is the new Access CS Live button, which opens up Adobe's extra-cost subscription services such as multiuser screen sharing and multiuser design review in your browser.

Pages and guides

Pages, which you can see on-screen surrounded by black outlines, reflect the page size you set up in the New Document dialog box (File➪New➪Document [⌘+N or Ctrl+N]). If in your document window it looks like two or more pages are touching, you're looking at a *spread.*

InDesign uses nonprinting guides, lines that show you the position of margins and that help you position objects on the page. *Margins* are the spaces at the outside of the page, whereas *columns* are vertical spaces where text is supposed to go by default. Magenta lines across the top and bottom of each page show the document's top and bottom margins. Violet lines show left and right columns (for single-page documents) or inside and outside columns (for spreads).

You can change the location of margin and column guides by choosing Layout➪Margins and Columns. You can create additional guides — such as to help you visually align objects — by holding down your mouse button on the horizontal or vertical ruler and then dragging a guide into the position you want.

Page controls

If you feel like flipping through pages of the document you're creating, InDesign makes it easy with page-turning buttons and the Page field and pop-up menu. Controls for entering prefixes for the page numbers of sections, and for indicating absolute page numbers in a document that contains multiple sections, are also handy. (An *absolute page number* indicates a page's position in the document, such as +1 for the first page, +2 for the second page, and so on.)

At the bottom left of the document window is a combined Page page-number field and pop-up menu encased by two sets of arrows. These arrows are page-turning buttons that take you to, from left to right, the first page, the preceding page, the next page, and the last page. Just click an arrow to get where you want to go.

You can also jump directly to a specific document page or master page in several ways:

- Highlight the current number in the page number field (by selecting it with your cursor), enter a new page number or master-page name, and press Return or Enter.
- Use the Go to Page dialog box (⌘+J or Ctrl+J), enter a new page number or a master-page name, and press Return or Enter.
- Choose the desired page from the Page pop-up menu.
- You can also use the Pages panel to navigate your document, as Chapter 4 explains.

Opening Multiple Document Windows

If you like to work on more than one project at once, you've come to the right program. InDesign lets you open several documents at once. It also lets you open multiple windows simultaneously for individual documents. A large monitor (or having multiple monitors connected) makes this multiwindow feature even more useful. By opening multiple windows, you can

- **Display two (or more) different pages or spreads at once.** You still have to work on the documents one at a time, but no navigation is required — you have only to click within the appropriate window.
- **Display multiple magnifications of the same page.** For example, you can work on a detail at high magnification in one window and display the entire page — and see the results of your detail work — at actual size in another window.

- **Display a master page in one window and a document page based on that master page in another window.** When you change the master page, the change is reflected in the window in which the associated document page is displayed.

Document windows are by default accessed through a set of tabs below the Control panel, though as I explain later, you can also work with them as a series of free-floating windows.

When multiple windows are open, you activate a window by clicking on a window's title tab or anywhere within its window. Also, the names of all open documents are displayed at the bottom of the Window menu. Choosing a document name from the Window menu brings that document to the front. If multiple windows are open for a particular document, each window is displayed (they're displayed in the order in which you created them) in the Window menu.

To show multiple windows on-screen at once, first make them free-floating by choosing Window➪Float All in Window. Then choose either

- Window➪Arrange➪Tile

  When you choose the Tile command, all open windows are resized and displayed side by side.

- Window➪Arrange➪Cascade

  When you choose the Cascade command, the windows overlap each other so that each title bar is visible.

You can also use one of the window-layout options in the Arrange Documents pop-up menu's options in the application bar. How they display will depend on the option you chose.

To put all these windows back into their regular tabs so that only one document window is visible on-screen at a time, choose Window➪Arrange➪Consolidate All Windows or choose the Consolidate All Windows option (the single-window icon) in the Arrange Documents pop-up menu in the application bar.

To close all windows for the currently displayed document, press Shift+⌘+W or Ctrl+Shift+W. To close all windows for all open documents, press Option+Shift+⌘+W or Ctrl+Alt+Shift+W.

Not only do you get separate document windows for each open document, but you can also create multiple windows for an individual document so that you can see different parts of it at the same time. To open a new window for the active document, choose Window➪Arrange➪New Window (or use the New Window option in the new Arrange Documents pop-up menu in the application bar). The new window is displayed in its

own tab or free-floating window, depending on whether you've enabled Open Documents as Tabs in the Interface pane of the Preferences dialog box (InDesign➪Preferences➪Interface [⌘+K] or Edit➪Preferences➪Interface [Ctrl+K]).

You can tell that a document window shows a different view of an existing document by looking at the name of the document in the window's title. At the end of the document name will be a colon (:) followed by a number. Newsletter.indd:1 would be the document's first window, Newsletter.indd:2 would be its second window, and so on.

Tooling around the Tools Panel

You can move the InDesign Tools panel (see Figure 1-2) — the control center for 32 of InDesign's 33 tools, as well as for 13 additional functions — by clicking and dragging it into position. The Tools panel usually appears to the left of a document.

The one tool not directly accessible from the Tools panel is the Marker tool. But you can switch to it from the Eyedropper tool by holding Option or Alt. (Chapter 6 explains its use.)

To discover each tool's "official" name, hover the mouse pointer over a tool for a few seconds, and a tool tip will appear (see Figure 1-2), telling you the name of that tool. If the tool tips don't display, make sure that the Tool Tips pop-up menu is set to Normal or Fast in the Interface pane of the Preferences dialog box (choose InDesign➪Preferences➪Interface [⌘+K] or Edit➪Preferences➪Interface [Ctrl+K]).

Tools panel includes tools for creating and manipulating the objects that make up your designs. The tools in the Tools panel are similar to those in other Adobe products (such as Photoshop, Illustrator, and Dreamweaver).

You don't need to worry about all the tools, so in the text that follows I highlight just those that you'll need to know to start using InDesign. You'll likely come across the other tools as you work on specific tasks, so I cover those tools in the chapters that introduce those functions.

The small arrow in the lower-right corner of some tools is a pop-out menu indicator. A tool that displays this arrow is hiding one or more similar tools. To access these "hidden" tools, click and hold a tool that has the pop-out menu indicator, as shown in Figure 1-2. You can also Control+click or right-click a tool to see the "hidden" tools. When the pop-out displays, click one of the new tools.

InDesign adds two tools: the Page tool (see Chapter 4) and the Gap tool (see Chapter 10). It drops the Position tool. Also, you can get more detail on any tool and how to use it by going to the new Tool Hints panel (choose Window➪ Utilities➪Tool Hints); it shows options for whatever tool you then select.

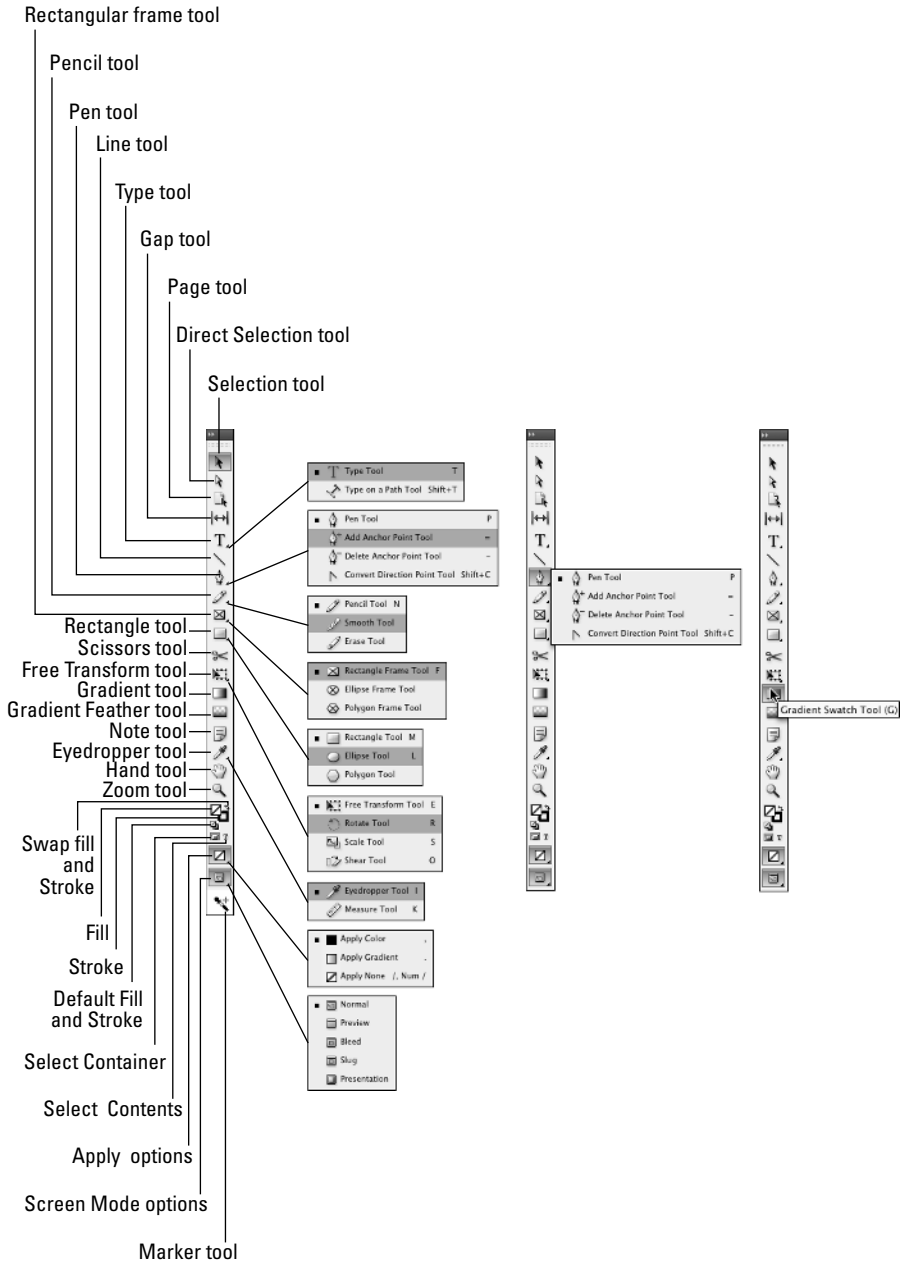

Figure 1-2: The InDesign Tools panel (left) and its pop-out tools (center). Hover the mouse over a tool to see its name (right).

Using the Selection tools

To work with objects, you have to select them. InDesign provides two tools to do that, letting you select different aspects of objects.

Selection tool

The Selection tool is perhaps the most-used tool in InDesign. With the Selection tool, you can select objects on the page and move or resize them. You may want to think of this tool as the Mover tool because it's the only tool that lets you drag objects around on-screen.

After you've selected the Selection tool, here's how it works:

- **To select any object on a document page,** click it. If you can't seem to select it, the object might be placed by a master page (a preformatted page used to format pages automatically), or the object might be behind another object.
- **To select an object placed by a master page,** press Shift+⌘ or Ctrl+Shift while you click.
- **To select an object that is completely behind another object,** ⌘+click it or Ctrl+click it. For graphics frames, you can also click the "doughnut hole" icon — formally called the *content grabber* — that appears over the center of an object when you hover over any portion of it.

The content grabber is new to InDesign CS5. You can turn it off and on by choosing View➪Extras➪Show/Hide Content Grabber.

Direct Selection tool

The Direct Selection tool is what you use to work on the contents of a frame, not the frame itself. For example, you can use the Direct Selection tool to select individual handles on objects to reshape them or to move graphics within their frames.

Here's how the Direct Selection tool works:

- **To select an object to reshape it,** click the object to display anchor points on the edges (the anchor points are hollow handles that you can select individually, as shown in Figure 1-3). You can drag the anchor points to reshape the object.
- **To select objects placed by a master page,** Shift+⌘+click or Ctrl+Shift+click, as with the Selection tool. The Direct Selection tool lets you easily select objects behind other objects and select items within groups.
- **To move a graphic within its frame,** click inside the frame and drag the graphic. The new content grabber is also available when using the Direct

Selection tool, making it easier to select and move graphics in frames that are overlapped by others.

- **To move a frame but leave the graphic in place,** click an edge of the frame and drag it.

Using the Type tool

A very frequently used tool, the Type tool lets you enter, edit, and format text. The Type tool also lets you create rectangular text frames.

Here's how the Type tool works:

- **To create a rectangular text frame,** click and drag; hold the Shift key to create a perfect square.
- **To begin typing or editing text,** click in a text frame or in any empty frame and type away.

I explain stories and threaded text frames in Chapter 11.

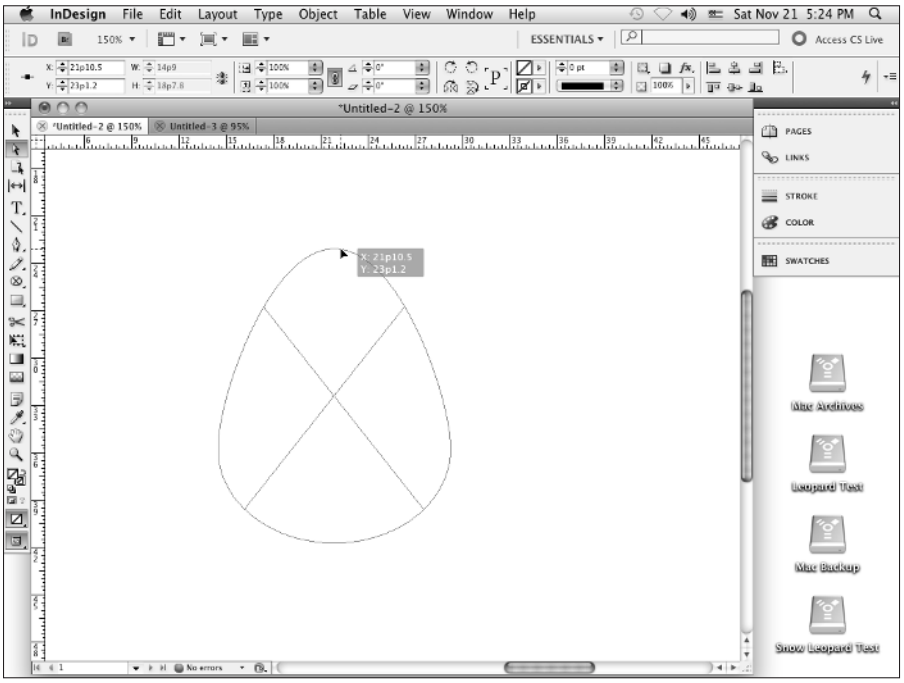

Figure 1-3: Reshaping an item with the Direct Selection tool.

Using the object-creation tools

InDesign has a bunch of tools for creating shapes. Part V covers them in more depth, but you should know about a few of them now because they create objects that can contain either text or graphics. Plus, you can also use them to draw your own shapes that you then color or otherwise embellish in your layout. Here's what you need to know:

- **Pen tool:** With the Pen tool, you can create simple illustrations. You use the Pen tool, which is modeled after the pen tools in Illustrator and Photoshop, to create paths (both open, such as lines, and closed, such as shapes) consisting of straight and curved segments. Give it a try — it's fun! (Chapter 7 explains how to use the tool.)
- **Type tool:** The Type tool lets you draw rectangular text frames, as well as type text inside them.
- **Line tool:** The Line tool lets you draw freestanding lines (paths) on your page. After selecting this tool, simply click and drag the mouse to draw the line. Holding the Shift key while you click and drag constrains the line angle to 45-degree increments, which is useful for creating straight horizontal and vertical lines.
- **Frame and shape tools:** InDesign has three frame tools (Rectangle Frame, Ellipse Frame, and Polygon Frame) and three shape tools (Rectangle, Ellipse, and Polygon). The frame and shape tools are redundant because both frames and shapes can hold text or graphics or be empty.

  Because the frame and shape tools really do the same thing, you might use the frame tool when creating frames that will have their content added later. Why? Because the frames appear with a big X through them, making them easier to spot when looking for frames to fill. The shape tools create frames without that X, so it's easier to overlook them.

  To create a rectangle or ellipse, choose the appropriate tool, click somewhere in the document window, and drag the mouse to another location. The rectangle or ellipse fills the area. But creating a polygon works differently, as Chapter 7 explains.

Using the navigation tools

Several tools, described in the following list, help you navigate your document so that you can move around your pages, move your pages around the screen, and change the degree of magnification to see just part of a page or to see several pages at once.

- **Hand tool:** The Hand tool lets you move a page around to view different portions of it or another page entirely. After selecting the Hand tool, click and drag in any direction. You can access the Hand tool temporarily without actually switching tools by pressing Option+spacebar or Alt+spacebar.

For a quick way to pan through your document, make sure that the Hand tool is active. Then click and hold the mouse. InDesign will zoom out and display a red rectangle. If you move the mouse, InDesign stops zooming and instead lets you move the rectangle to a new area of focus. Let go to have InDesign display that part of the document back at the original zoom setting. If the autozoom is too fast, you can use the up and down arrow keys instead to manually move through various zoom levels. And if you decide you've navigated some place you didn't mean to, just press Esc — as long as the mouse is still pressed — to start over.

- **Zoom tool:** With the Zoom tool, you increase and decrease the document view scale. You can highlight a specific area on a page to change its view, or you can click on-screen to change the view scale within InDesign's preset increments, which is the same as pressing ⌘+= or Ctrl+= to zoom in.
- **Screen Mode buttons:** At the very bottom of the Tools panel is the Screen Mode button, which by default shows the Normal mode as active. Its pop-out menu has four additional options: Bleed, Slug, Preview, and Presentation. The Normal screen mode shows rulers, frame edges, document margins, page boundaries, guides, text flow indicators, and all the other visual cues that InDesign displays to help you identify various kinds of objects. The Preview mode shows you just the pages and their content, without these onscreen indicators, so you can see what the reader will ultimately see, The Bleed mode is a variation of the Preview mode that shows any objects that *bleed* (extend) beyond the page boundaries, whereas Slug mode is a variation of the Preview mode that shows the space reserved for information such as crop marks and color separation names used in final output. (The View menu also has a Screen Mode submenu that lets you access these modes.)

The new Presentation mode is also a variation of the Preview mode, except that even the InDesign menus and document window disappear, so all you see is the layout. Furthermore, you can go through the layout as if it were a slideshow, such as to show the layout comps to a client. Click the mouse or press → to advance to the next spread, and Shift+click or right-click the mouse or press ← to go to the previous spread. You can also press Home to go to the first spread and End to go to the final spread. Press Esc to return to your previous screen mode.

If your Tools panel displays in two columns, you get two screen mode buttons at the bottom of the panel: Normal and Preview. In that case, Preview Mode has a pop-out menu that also has the Presentation, Bleed, and Slug options. To toggle between single-column and two-column views of the Tools panel, click the collapse icon (>> or <<, depending on how many columns are displayed) at the top of the panel.

Using contextual menus

InDesign's contextual menu interface element is very useful. By Control+clicking or right-clicking the document, an object, elements listed in a panel (such as a list of files or styles), the rulers, and so on, you can display a menu of options for modifying whatever it is you clicked. InDesign provides a lot of options this way, and using the contextual menus to access InDesign functions is often easier than hunting through the many regular menu options and panels.

Working with Panels, Docks, and Workspaces

InDesign has so many controls and features that its designers have long ago stopped relying on menu commands to access them all. Instead, most of InDesign's features are presented as sort of miniature dialog boxes, called *panels,* that are "windows" of readily accessible options to consider when working in InDesign.

Working with panels

Panels provide an interactive method of working with features, one that lets you access the controls quickly. In many cases, panels offer the only method for performing many tasks. Figure 1-1, earlier in this chapter, shows the panels that appear on-screen by default. Note that you can access all panels — except Quick Apply and Tabs — via the Window menu, whether or not the panel is displayed on-screen at the moment.

Panels typically have three — but sometimes four — controls:

- All panels but the Access CS Live, Attributes, Background Tasks, CS News and Resources, Kuler, Pathfinder, Script Label, Story, Tool Hints, and Tools panels have a flyout menu, which provides a pop-up menu of controls relevant to that panel.
- Any *active panel* — meaning it's displayed in front of any others in its panel group so that you can actually modify its settings — has a close control to remove the panel from the panel group. This control isn't a way to switch to another panel in that panel group — to do that, just click the tab of the panel you want to work with. (If you remove a panel by mistake, go to the Window menu to open it again.)

- Any active panel has a collapse control (the >> icon). For panels in the dock, clicking that icon collapses it back into the dock. For panels not in the dock (that is, for *floating panels*), collapsing them shrinks the panel to a much smaller size to get them out of the way. When collapsed, these panels will have a << icon to expand them again. (The Tools panel is an exception: Clicking the >> icon changes it to a two-column layout, while clicking the << icon changes it to a one-column layout.)
- *Some* panels have an expand/collapse control, which looks like a caret (^) above a down-facing caret. Click the control to show more or fewer options. (If all options are displayed, clicking the control will shorten the panel and hide some of the advanced options; if only the basic options are displayed, clicking the control lengthens the panel and shows all the options.)

Panels new to InDesign CS5 are

- The Access CS Live, CS News and Resources, and CS Review panels (which relate to extra-cost online services from Adobe not covered in this book)
- The Animation, Background Tasks, Media, Object States, Preview, and Timing panels, which are part of InDesign CS5's new multimedia capabilities (see Chapter 24)
- The Mini Bridge and Tool Hints panels covered in this chapter
- The Track Changes panels (see Chapter 12)

To better suit your working style, you can drag panels by their tabs to move them from one panel group to another, drag them out of a dock so that they're free-floating, or drag them into a dock so that they're no longer free-floating. The dock feature lets you keep panel groups in one contained area, which helps keep the interface from getting too cluttered. But you're not forced to work this way: You can still drag panels outside the main dock so that they're free-floating on-screen.

Not all panels display in the main dock; less-used panels, such as Data Merge, show up in a free-floating panel group when you open them via the Window menu. Of course, you can always add such panels to the main dock if you use them a lot.

All but three panels have a tab, which contains its name, to help you select the desired panel without having to go to the Window menu. The three special panels (without tabs) are the Tools, Control, and Quick Apply panels. Unlike the rest of InDesign's panels, they can't be grouped with other panels, so you don't need a tab to select them. Also, note that the Quick Apply panel is the only one not available via the Window menu; instead, use the lightning-bolt

icon to open it from the Control panel and several other panels; you can also choose Edit➪Quick Apply (⌘+Return or Ctrl+Enter).

To quickly select a panel, just click its tab from its open panel group. When a panel is active, its controls have the following characteristics:

- **To display and select an option,** click a pop-up menu or an iconic button; the changes take effect immediately.
- **To place a new value in a field,** highlight the value that's already in the field and enter the new value. Note that fields accept values in all supported measurement systems, as described in the "Specifying measurement values" section, earlier in this chapter. To implement the new value, press Shift+Return or Shift+Enter. To get out of a field you've modified, leaving the object unchanged, press Esc.
- **To increase or decrease the value in the field,** use the clickable up and down arrows where available.
- **To use math to perform changes,** enter calculations in the field. You can add, subtract, multiply, and divide values in fields by using the following operators: +, –, * (multiply), and / (divide). For example, to reduce the width of a frame by half, type **/2** after the current value in the Width field. Or, to increase the length of a line by 6 points, you can type **+6** next to the current value in the Length field. You can also use percentages in fields, such as 50%, which adjusts the current value by that percentage.

As with the tools, if you make sure that Tool Tips is set to Normal or Fast in the Interface pane of the Preferences dialog box (choose InDesign➪Preferences➪Interface [⌘+K] or Edit➪Preferences➪Interface [Ctrl+K]), you'll get some ideas as to what the panel iconic buttons and fields do.

If panels are getting in your way, you can make them all disappear by pressing Tab — as long as the Type tool is not active and the text cursor is active within a text frame, of course. Press Tab to get your panels back.

Working with docks

Docks have controls to collapse and expand them. Click the double-arrow iconic button at a dock's upper corner to collapse or expand the dock. You can also resize the main dock by dragging its resize handle. Figure 1-4 shows the dock controls and what they look like when expanded and collapsed.

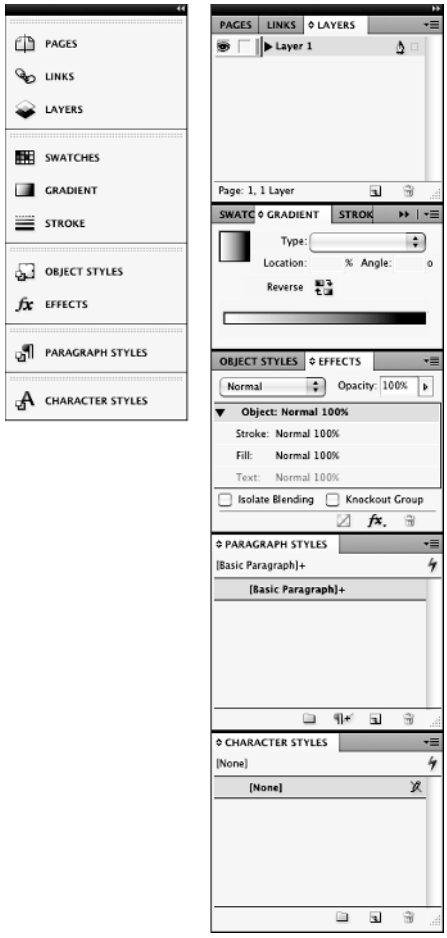

Figure 1-4: The collapsed dock is the default (left), but you can expand it (right).

Working with workspaces

Although you can rearrange InDesign's panels to suit your needs, rearranging again and again as you switch from one task to another can be a real chore. For example, you may open several of the table- and text-oriented panels when working on text, but then close them and open the graphics- and positioning-oriented panels when refining layout placement.

That's why InDesign lets you create *workspaces,* which are essentially memorized panel collections. Display the panels you want, where you want them, and create a new workspace by choosing Window➪Workspace➪New

Workspace. (Note that this menu option has been called Save Workspace in previous versions.) Give the workspace a name that makes sense, such as Text Panels. That workspace is now available via Window➪Workspace➪ *workspace name,* automatically displaying just those saved panels in their saved locations.

Not only can you save workspaces, but you can also tell InDesign to save any menu customizations made along with the currently opened selection panels into that workspace. (Chapter 2 covers menu customization.)

Working with the Mini Bridge

Adobe's Bridge application lets you manage project files across the Adobe Creative Suite, as well as get preview information on files and their attributes (such as color depth for image files).

Bridge is mostly used by Photoshop users, but you might find it useful for perusing project files or searching for files based on metadata attributes such as color model.

The new Mini Bridge panel in InDesign CS5 lets you use Bridge's file navigation and information capabilities without leaving InDesign.

To navigate to files on your computer from Mini Bridge, start by turning on the Panel Bar view; click the Panel View icon (it looks like a page) and select Panel Bar. Now you can navigate your files in Mini Bridge. You can also drag files right into InDesign from Mini Bridge.

Surveying the Menus

Although InDesign relies heavily on its panels to present its rich capabilities, it also uses traditional menus. In some cases, you can use menus instead of panels; in others, you must use a menu command; in still others, you must use a panel (such as for the data merge and object alignment features).

InDesign for Windows has nine menus, while InDesign for Macintosh has ten:

- **InDesign (Macintosh only):** This menu contains the Preferences menu, where you set much of InDesign's behavioral defaults. You can also configure plug-ins (now called *extensions*) here. Other functions are standard for all Mac programs, including hiding and quitting the program. Note that none of these menu items' functions are available in panels.
- **File:** This menu is where you open, create, save, close, export, and set up documents and books; where you import text and graphics; where

you print documents and prepare them for commercial printing; and where you set basic user information. Note that none of these menu items' functions are available in panels, except for the Preflight feature.

- **Edit:** This menu lets you cut, copy, and paste elements; edit, spell-check, and do search-and-replace operations across entire stories and set up story for the InCopy add-on program; adjust and manage color settings; set up and change keyboard shortcuts and menu preferences; apply various styles to selected objects and text; and undo and redo recent actions. In Windows, you also set preferences and quit the program from this menu. Note that these menu items' functions, except for Quick Apply, aren't available in panels.
- **Layout:** With this menu, you add, delete, rearrange, and navigate pages; change margins and guides; automatically resize a page and its objects; set up page numbering and sections; and create and format tables of contents. Note that these menu options' functions — except for the Pages, page-navigation, and Numbering & Section Options menus — aren't available in panels.
- **Type:** With this menu, you adjust typographic attributes such as size and font, insert special characters, work with footnotes, work with layout notes; add placeholder text; and control the on-screen display of special characters such as spaces. Note that the Find Font, Change Case, Type on a Path, Document Footnote Options, Text Variables, Insert Character, Fill with Placeholder Text, Tabs, and Show Hidden Characters menu items' functions aren't available through panels.
- **Object:** You use this menu to change the shape, size, location, and other attributes of objects, such as frames and lines; apply special effects to objects; insert multimedia effects such as buttons; and control how fast the screen redraws when you make changes. Note that the Text Frame Options, Anchored Object, Corner Options, Clipping Path, and Convert Shape menu items' functions aren't available through panels.
- **Table:** Use this menu to create, change, and format tables and cells. Note that this menu's functions *are* available through panels.
- **View:** This menu lets you control the display of your document, from zoom level to whether guides, rulers, and frame edges appear. Note that none of these menu items' functions, except for Screen Mode and the zoom controls, are available in panels.
- **Window:** This menu is where you manage the display of document windows and panels, as well as where you set up and work with workspaces. The window display and workspace functions aren't available via panels.
- **Help:** Use this menu to access InDesign's help system and manage product activation and registration. In Windows, this menu also lets you manage plug-ins. Note that none of these menu items' functions are available in panels.